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**FINAL REPORT
OF THE
EVALUATION TASK FORCE**

THE
**SOCIAL
PLANNING**

and **RESEARCH COUNCIL**
of Hamilton and District

URBAN MUNICIPAL
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**FINAL REPORT
OF THE
EVALUATION TASK FORCE**

September 1992

SOCIAL PLANNING AND RESEARCH COUNCIL OF HAMILTON AND DISTRICT






THE SOCIAL PLANNING AND RESEARCH COUNCIL
OF HAMILTON AND DISTRICT

155 James Street South, Suite 601
Hamilton, Ontario L8P 3A4

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BACKGROUND

In February 1991, the Evaluation Sub-Committee of the Research Advisory Committee discussed the proposed development of an Evaluation Consultation Programme as a new community-based SPRC initiative. Much of the initial focus was on issues of planning and implementation of this Trillium Foundation funded project. In its deliberations, the Sub-Committee also recognized a need for the Council to have a more formalized evaluation process of its own.

Results from a Fall 1990 Board/Volunteer/Staff retreat emphasized the need to acknowledge the link between effective and comprehensive evaluation and maximized planning and priority-setting capabilities. Subsequent Board discussion in the Spring of 1991 addressed this concern more specifically by asking:

1. How important is it for the SPRC to continuously assess its impact(s) on the community and how should it be done?
2. How can the SPRC better integrate community input into its own process of evaluation?
3. How rigid has our process been and what principles might guide us towards effective evaluation?

In September 1991, the Board created an ad hoc committee, herein known as the Evaluation Task Force, to examine these and other questions and to prepare a report for the presentation of key findings and recommendations.

EVALUATION TASK FORCE - MANDATE AND STRUCTURE

As a first step, the Task Force developed its mandate including terms of reference and membership considerations.

1. Terms of Reference

The Evaluation Task Force will function under the following terms:

1. To update an inventory of SPRC activities in the past two years.
2. To establish the relationship between programme activities and the Mission, and stated goals of the SPRC.
3. To identify the relative importance of external organizations (stakeholders) in determining SPRC activities.
4. To develop measurable objectives for SPRC goal statements which can serve as a basis for the ongoing evaluation of SPRC programs.
5. To review the range of current and potential approaches to program evaluation within the SPRC.

2. Membership

Task Force committee membership was to comprise: three members from the current Board of Directors, two Research Advisory Committee members, two Community Development Discussion Group members, three Consumers/Community group representatives, and one staff person (refer to Appendix A).

TASK FORCE ACTIVITIES

Four primary tasks were undertaken by the committee:

1. Analysis of an inventory of project/consultations;
2. Monthly Staff Time Analysis - Discussion;
3. SPRC Evaluation Matrix; and
4. Developing principles for evaluation.

1. Inventory of Projects and Consultations

An overview of projects and major consultations completed or underway over the past 12 months was constructed. This also included details regarding the point-of-origin for each activity, i.e., where the initial proposal or recommendation for the project/consultation originated (refer to Appendix B).

2. Monthly Staff Time Analysis

This involved discussion regarding the continuing practice of monthly staff time analysis in the form of categorized time summaries for professional staff. Each summary represents the number of hours a staff person has contributed to various in-house committees or projects, external community consultations, or other involvements (refer to Appendix C).

3. SPRC Evaluation Matrix

This was an educational exercise intended to provide Task Force members with an example of the way in which SPRC activities can be categorized according to key program goal areas and corresponding evaluation design to measure related impacts. The four goal areas included: policy generation, community-development-based planning, research, and trends analysis (refer to Appendix D).

4. Developing Principles for Evaluation

Concurrent with an analysis of SPRC programme and evaluation resources was the development of a draft set of basic principles to guide SPRC evaluation activities. These principles were to apply both within the organization and in its many community-based activities.

KEY FINDINGS

1. Principles for Evaluation

The purpose of evaluation is to gather information about the organization which will be useful in measuring goals and objectives. Methods for conducting evaluation should be practical and clearly understood by members of the organization. It is important to consult with organization members in developing the design of an evaluation.

Evaluation provides information which should inform participants of choices about the future of the organization and should be seen as contributing to opportunities for change.

The evaluation process should be:

- (i) Constructive in nature, and useful to organization members in re-directing the efforts of the organization or revising its vision.
- (ii) Self-evaluative; that is, members of the organization own the process and its results. Evaluation must first serve their need for measures of effectiveness and success with the goals of the organization established by members.
- (iii) Participatory by design and include in the process useful opportunities for input from all elements of the organization and those affected by its work. This includes Board and committee members, regular members, consumers/clients, staff and funders.
- (iv) Routine and regular; evaluation must be conducted on a regularly scheduled basis rather than when convenient or in response to crisis.

2. Describing the Context for SPRC Evaluation

Enhancing organizational planning and priority-setting within the SPRC requires a recognition that all activities are evaluated. Given the complex nature of SPRC activities, it is also important to recognize that there is not one template or model which is most appropriate for evaluation. Each activity may require a fundamentally different mode of assessment.

In addition, there is a need to consider the definition of how much time and effort can be prescribed to a particular SPRC evaluation activity. A "rule of thumb" is that 3-5 percent of activity time should be taken up in evaluation. However, the actual amount of time should more likely relate to the amount of corresponding time spent in carrying out the overall activity.

Every evaluative component is, at the very least, dependent on:

- a) the parameters of the program or activity;
- b) SPRC goals and values against which it should be measured, e.g., "effective citizen participation", or "providing support to community decision-making";
and
- c) utilization of SPRC Principles as a basis for beginning any such process of evaluation.

3. The Evaluation Process

Any process should seek to ensure community involvement and to make certain that community stakeholders have a clear understanding of evaluation within the context of that activity.

In formulating effective evaluation activities, it is important to be inclusive in determining participants and explicit in the identification of roles, vis-a-vis which human resources should be utilized in the evaluation, i.e., staff, Board/Volunteers, participants, etc.

It is also important that the organization track its processes in a comprehensive manner, tying this concept back to our ongoing priorities and planning system. Using the philosophical models which have been established, i.e., community development tenets, Statement of Research Philosophy, and evaluation principles, this tracking should enable the organization to look both inwardly at effectiveness and to utilize information to validate our external accountability to both the "community" and funders.

It is critical that the SPRC be clear in stating its objectives behind each involvement in the community. It is important to acknowledge that the decision-making process within which the organization functions really tends to be more political at times than practical.

FUTURE DIRECTIONS

The future direction of this report and its findings should consider the following recommendations for action:

1. The organization (SPRC) should formally adopt the report of the Evaluation Task Force, including the framework document which outlines "Principles for Evaluation".
2. Develop some policy statements which serve to incorporate and integrate the findings of the Task Force, including evaluation principles, into the structure process and outcomes of SPRC activities, i.e., any new proposal should have an evaluation component noted within its related documents.
3. Further identify and articulate the vehicles or means by which these evaluation-based policies can be most effectively implemented and measured.
4.
 - a) At the outset, (e.g., in the first six months) these policies should be implemented using just one category of SPRC activities, e.g., In-house projects, and a means of "pilot-testing."
 - b) Staff should report back to the Board in approximately six months re: development and implementation of these policies.

APPENDICES

APPENDIX A - EVALUATION TASK FORCE MEMBERSHIP LIST

APPENDIX B - INVENTORY OF PROJECTS AND CONSULTATIONS (Fall, 1991)

APPENDIX C - STAFF TIME ANALYSIS

APPENDIX D - SAMPLE MATRIX OF SPRC ACTIVITIES BY METHODS OF EVALUATION

APPENDIX A

EVALUATION TASK FORCE MEMBERSHIP LIST

Mary Ann Seldon (Chairperson)	SPRC Board
George McLauchlin	SPRC Board - Community Development
Marion Emo	SPRC Board - Research Advisory Committee
Doug Sider	Research Advisory Committee
Linda Jenkins	Community
Don Jaffray	SPRC staff
Ritch Whyman	Community
Staff Resource:	Caroline Ball Mike Pennock

APPENDIX B

INVENTORY OF PROJECTS AND CONSULTATIONS

Fall, 1991

Social Planning and Research Council of Hamilton and District
155 James Street South, Suite 601, Hamilton, Ontario. L8P 3A4

I. FUNDED PROJECTS AND CONSULTATIONS

1) Settlement and Integration Study

PURPOSE: To conduct a needs assessment of settlement and integration services for immigrants in Hamilton-Wentworth.

Staff Contacts: Mike Pennock and Denise Brooks

Completion Date: February, 1991

Comments: 1.5 Staff persons have been hired to carry out this project (Denise Brooks and Akosia Tulloch). Board approval of final report will be required. Steering Committee has been formed.

2) Hamilton Against Poverty

PURPOSE: To provide organizational development assistance, technical and resource support to Hamilton Against Poverty.

Staff Contact: Don Jaffray

Completion Date: August, 1992

Comments: Three staff-persons have been hired through the Provincial Social Services Employment Project.

3) Housing Assistance and Awareness Program

PURPOSE: To increase the awareness of the affordable housing problem among the labour community. This project is in its third year of operation.

Staff Contact: Don Jaffray and Paula Randazzo

Comments: Although this project will finish in January, it has resulted in the entry of the United Steelworkers' Local 1005 into the non-profit housing field. Ongoing support will be provided under a new project entitled "Labourhood".

4) Citizen Action Group Evaluation

PURPOSE: To evaluate a new plant-closure program offered by Citizen Action Group.

Staff Contact: Mike Pennock

Completion Date: March 31, 1992

Comments: SPRC will be working in partnership with a private sector consulting service in completing this evaluation.

5) Regional Employment Assistance Program Evaluation

PURPOSE: To evaluate a new employment assistance program in Regional Social Services.

Staff Contact: Caroline Ball

Completion Date: March 31, 1992

Comments: Consultation initiated by Employment and Immigration Canada and Regional Social Services

II. NON-FUNDED PROJECTS AND CONSULTATIONS

1) Promise the Children 2000

PURPOSE: To develop a comprehensive community plan for alleviating the prevalence and consequences of child poverty in Hamilton-Wentworth.

Staff Contact: Mike Pennock

Completion Date: Plan development: February, 1992
Implementation: Ongoing

Comments: Initiated by SPRC. Network of external committees developed.

2) Taxation Review Task Force

PURPOSE: To develop SPRC policies pertaining to taxation and related issues.

Staff Contact: Mike Pennock

Completion Date: February, 1992

Comments: Internal SPRC Committee

3) Community Agencies Review Board

PURPOSE: To develop a mechanism for reviewing consumer complaints about community services.

Staff Contact: Don Jaffray

Completion Date: December, 1991

Status: Consultation initiated by SPRC and Regional Social Services.

4) Self Help Centre

PURPOSE: To develop a Centre for Self Help Groups in Hamilton-Wentworth.

Staff Contact: Mike Pennock

Completion Date: August, 1992

Status: External committee initiated by SPRC. Implementation of recommendation from 1988 study of self-help groups by SPRC.

5) Community Services Planning Group

PURPOSE: To develop a co-ordinated approach to planning and priority-setting among community services in Hamilton-Wentworth.

Staff Contact: Mike Pennock

Completion Date: Ongoing

Status: External committee initiated by SPRC.

III. MEMBERSHIP ON EXTERNAL COMMITTEES

1) Addictions Committee of the District Health Council

PURPOSE: To facilitate the development of a service co-ordination model for addiction services in Hamilton-Wentworth.

Staff Contact: Don Jaffray, committee member
Chairperson , Addiction Services Planning Committee

2) AATD Advisory Planning Team

PURPOSE: To provide advice to staff on the use of four major data bases in the planning of services and identification of trends in Hamilton-Wentworth.

Staff Contact: Gloria DeSantis, committee member

3) United Way

a) Agency Relations Committee

PURPOSE: To plan for and allocate United Way funds to agencies in Hamilton-Wentworth.

Staff Contact: Caroline Ball, committee consultant.

b) Allocations Working Group

Staff Contact: Caroline Ball, committee member

4) Central Area Plan Implementation Committee (City of Hamilton)

PURPOSE: To advise the City Planning and Development Committee on downtown development issues.

Staff Contact: Gloria DeSantis, committee member

5) Educating Future Physicians in Ontario: Public Expectations Committee

PURPOSE: To define the future role of physicians in Ontario and make appropriate revisions in medical school curriculum.

Staff Contact: Mike Pennock, committee chairperson

6) District Health Council - Mental Health Committee

PURPOSE: To provide a forum for communication and information exchange among service providers and consumers in order to facilitate the planning and co-ordination of a comprehensive mental health system in Hamilton-Wentworth.

Staff Contact: Don Jaffray/Gloria DeSantis, committee member

7) Regional Chairman's Sustainable Development Task Force

PURPOSE: To apply the concepts of sustainable development to Regional Government decision-making.

Staff Contacts: Caroline Ball/Gloria DeSantis, staff consultants.

8) Labour Force Constellation

PURPOSE: To develop a plan for meeting future labour force needs in Hamilton-Wentworth.

Staff Contact: Mike Pennock, committee member

9) Regional Employment Adjustment Committee

PURPOSE: To develop an effective response to plant closures and major lay-offs in Hamilton-Wentworth.

Staff Contact: Mike Pennock, committee member

10) Long Term Care Consultation Advisory Committee

PURPOSE: To advise the Provincial Community Health and Support Services Division on the development of an effective consultation process for long term care services in Hamilton-Wentworth.

Staff Contact: Mike Pennock, committee member.

11) Anonymous Testing and AIDS Committee

PURPOSE: To advise the Region about the development of anonymous testing for HIV+ and AIDS in Hamilton-Wentworth.

Staff Contact: Mike Pennock, committee chairperson

12) Hamilton-Wentworth Housing Authority: Skills Development Program Steering Committee

PURPOSE: To develop and implement specialized skill development programs for children in non-profit housing.

Staff Contact: Caroline Ball, committee member

13) Community Information Services Planning Committee

PURPOSE: To assist CIS in service planning.

Staff Contact: Caroline Ball, committee member

IV. PROJECTS AND MAJOR CONSULTATIONS COMPLETED SINCE FALL 1990

Hamilton Public Library Locke-Picton Study

This paid consultation was completed; HPL is now in the process of implementing results.

Hamilton Foundation Priorities Study

This paid consultation was completed. Report available.

Long-Term Care for the Disabled

SPRC was represented on a committee of the Regional Municipality which reviewed the needs of disabled persons in Hamilton-Wentworth. The Final report has been completed and will go to the Region in the Fall of 1991.

Diverse Racial and Cultural Groups Access to the Social Services System

Carried out under our funding agreement with Region. Final report has been approved by the Board of Directors. SPRC is monitoring implementation and has established internal committee for the development of SPRC policies.

Regional Chairman's Task Force on Affordable Housing

Task Force has completed its work. SPRC provided staff support and assisted with an evaluation of Task Force process. Letter has been sent to the Region suggesting that Task Force continue to have a role in monitoring implementation.

Regional Indian Centre - Employment Needs Assessment

Funded consultation. Final report prepared by the Regional Indian Centre. SPRC provided research services.

Regional Task Force on AIDS

SPRC staff served on the Task Force. Report has been presented to the Region. Currently in implementation stage. SPRC staff-person is chairing a committee dealing with the implementation of anonymous testing for HIV+ and AIDS in Hamilton-Wentworth.

Sexual Abuse Task Force

SPRC staff served on external Task Force. Final report has been prepared. No immediate implications for SPRC.

Street Youth Implementation Committee

SPRC staff served on external committee which was set up to implement results of Street Youth Task Force. Implementation has been completed with the establishment of a new program for street youth.

Victims' Services Task Force

SPRC provided staff and logistical support to an external task force which was created to establish a support service to victims of crime. Funding has been secured and an agency is being established. SPRC is serving as a trustee of funds until the service is properly constituted. SPRC staff person (Mike Pennock) is serving on the Board of Directors of this agency.

Kirkendall-Strathcona Neighbourhood House Needs Assessment

SPRC provided staff support to Wesley Urban Ministries in carrying out this needs assessment. The report has been completed and Wesley Urban Ministries is now in the process of implementing the recommendations.

City of Hamilton Housing Intensification Study

SPRC provided staff support to this study. The report has been completed and adopted by City Council.

October 15, 1991
MP/ms/15

APPENDIX C

STAFF TIME ANALYSIS

In general, there has been an increase in administrative time with a corresponding decrease in project and consultation time. Background or professional development time has also decreased while time commitments to community liaison have increased.

Administrative Activities

Within the time-recording system, administrative activities are divided into two categories - general administration and administrative committees. The latter category includes attendance and preparation time for all of the administrative committees of the Council.

Both of these categories have increased. The substantial increase in the allocation of time to administrative committees has resulted from a number of factors:

- 1) An increase in the number of staff meetings.
- 2) The establishment of new administrative committees during the past two years - Priorities Review Task Force, Sustainable Development Sub-Committee, our Multicultural Sub-Committee and the Transportation Sub-Committee.
- 3) An unfilled vacancy for part of the last fiscal year, with no corresponding decrease in administrative commitments.

The reasons for the increase in general administration are somewhat less clear. Activities relating to our ongoing strategic planning activities fall into this category, as does the time devoted to preparing unsolicited funding proposals (i.e., the Evaluation Unit). Both of these activities have increased during the past two or three years and have undoubtedly had an impact. However, we do not record the nature of specific administrative activities within our time recording system, so a more definitive analysis is not possible.

	YEAR				
	<u>86/87</u>	<u>87/88</u>	<u>88/89</u>	<u>89/90</u>	<u>90/91</u>
<u>Administration</u>					
a) General	10.0	13.6	17.4	n/a	16.5
b) Committee	8.5	8.6	8.8	n/a	12.0
Sub-total	18.5	22.2	26.2	n/a	28.5
<u>Program Committees</u>	5.5	3.9	4.7	n/a	2.5
<u>Consultations</u>					
a) Major	23.5	13.3	20.9	n/a	25.5
b) Minor	16.1	15.9	16.8	n/a	19.5
Sub-total	39.6	29.2	37.7	n/a	45.0
<u>Projects</u>	27.9	35.7	22.4	n/a	16.5
<u>Background</u>	6.8	7.3	4.8	n/a	4.0
<u>Community Liaison</u>	1.6	1.8	4.2	n/a	3.5
Total	99.9	100.1	100.0		100.0

Program Committees

Program committees are standing or ad hoc committees which are created for the purpose of guiding program activities (i.e., Research Advisory Committee, Community Development Advisory Committee and Social Housing Action Committee).

The recent decrease in the time allocation to this category is largely due to the inactivity of the Community Development Advisory Committee.

Background

Professional development activities have decreased, largely as a result of diminished time availability. These activities tend to be "squeezed out" by increases in other categories. There are also very limited resources available for conference activities.

Community Liaison

The majority of activities in this area involve presentations, speeches and liaison with the media. Time allocations in this category have increased.

Projects and Consultations

Projects and consultations comprise the "program" or "service" area of SPRC activities. Activities are categorized as consultations if they are carried out in response to external requests and are not "owned" by the SPRC (i.e., the SPRC does not own the final report or product of the activity). Projects are internally generated activities.

For administrative purposes, consultations are divided into two categories: Major consultations involve more than 35 hours of staff time in a 12-month period and require Board approval. Minor consultations involve less than 35 hours of staff time and do not require Board approval.

The allocation of staff time to these categories has decreased in response to increased administrative allocations. Within this category, there has been a significant reduction in project time and a slight increase in consultation time, particularly in major consultations. Annual fluctuations in these categories cause difficulty in identifying specific trends.

Projects and major consultations involved approximately 42% of staff time in 1990-91. For the purposes of this analysis, the individual projects and major consultations were classified, by the Executive Director, in terms of:

- a) the primary content area addressed (i.e., housing)
- b) the primary functional area of activity involved.

The "functional areas" were defined on the basis of the definitions which had been utilized in a 1982 priorities study within the SPRC.

The attached figures present the results of this analysis. Figure I indicates the percentage of total project/major consultation time that was devoted to each of 11 content areas. Figure II presents the same breakdown, classified by functional areas.

It is important to note that these figures only apply to SPRC "core staff" time - project staff time is not included. In the case of "illiteracy", for example, the Council was involved in a major consultation on this topic but relatively little core staff time was devoted to it. We had a full-time project staff person who carried out the work.

FIGURE I

Projects and Major Consultations by Content Area

	%
1) Housing	25.7
2) Poverty/Income	23.7
3) Multiculturalism	16.7
4) Child care	6.6
5) Taxation	3.4
6) Addictions	3.1
7) Employment	2.5
8) Disabled	2.2
9) Mental Health	1.7
10) Illiteracy	1.3
11) Cross-sector	13.0

FIGURE II

Projects and Major Consultations by Functional Area

	%
1) Social policy development and advocacy	52.2
2) Service co-ordination	13.9
3) Organizational assistance to community groups	10.7
4) Social impact assessment of government policy	10.3
5) Socio-economic trends analysis	5.6
6) Needs assessment	4.3
7) Evaluation	2.3
8) Public policy changes affecting citizen participation	.6

APPENDIX D

Sample Matrix of SPRC Activities by Methods of Evaluation

	<u>Key Components</u>	<u>Means of Evaluation</u>	<u>Notes</u>
A. Policy Generation			
1. SHAC	<ul style="list-style-type: none"> - action/advisory - development of strategies re attitudes and community educ. - committee support & participation in dev. of housing awareness activities 	<ul style="list-style-type: none"> - process analysis - impact assessment - participant feedbk. 	
2. Taxation Review Committee	<ul style="list-style-type: none"> - time limited - review of taxation issues: <ul style="list-style-type: none"> a) for SPRC policy b) for public educ. c) for discussion paper/publication 	<ul style="list-style-type: none"> - content analysis - process analysis - delphi process - participant feedbk. 	
<hr/>			
B. CD-Based Planning			
1. Child Pov. Forum	<ul style="list-style-type: none"> - dev. of community "network" of grps. focusing on impact of future strategic plans in/between sectors to decrease child poverty 	<ul style="list-style-type: none"> - process analysis - storytelling - impact assessment - network analysis 	
2. Multi-cultural Study	<ul style="list-style-type: none"> - community-based consultation to look at access of div. racial/cult. groups to soc. ser. 	<ul style="list-style-type: none"> - process analysis - feasibility assessment - participant satisfaction surveys 	
<hr/>			
C. Research			
1. Publication Development	<ul style="list-style-type: none"> - dev. of written materials for use by the public 	<ul style="list-style-type: none"> - content analysis - community consults - cost benefit analysis 	

2. Trends
- collection and analysis of data focusing on future trends, e.g., labour and economic dev.
 - systems analysis
 - content analysis
 - community circulation

D. Networks/ Community Liaison

1. Sustainable - SPRC in-house comm. - participant satis.
Dev. T.F. - staff involvement - staff/volunteer retreat
in work grps. and
Process Advisory - T.F. self-evaluation
Committee - process analysis

